

iEdison

Version 4.5.0.10

Release Notes

New Features

The following two major changes have been implemented in iEdison:

- Updated look to the *Main Menu* and *Patent Report* Screens
- Ability to Create a Hierarchal Patent Parent/Child Linking Structure

iEdison Main Menu and Patent Report Screens have an Updated Look

The iEdison *Main Menu* screen has an updated look, but the functionality is the same. Instead of menu tabs across the top of the screen, they are now located above the words, *Main Menu*. These tabs appear across most iEdison screen. The **Search** menu tab is now replaced with the three new search tabs: **Search Inventions**, **Search Patents**, and **Search Utilization**. The **About**, **Help**, and **Logout** tabs are located to the right. All the iEdison screens look the same except for the *Patent Search*, the *Patent Search Results*, and the *Create Patent Record* screens.

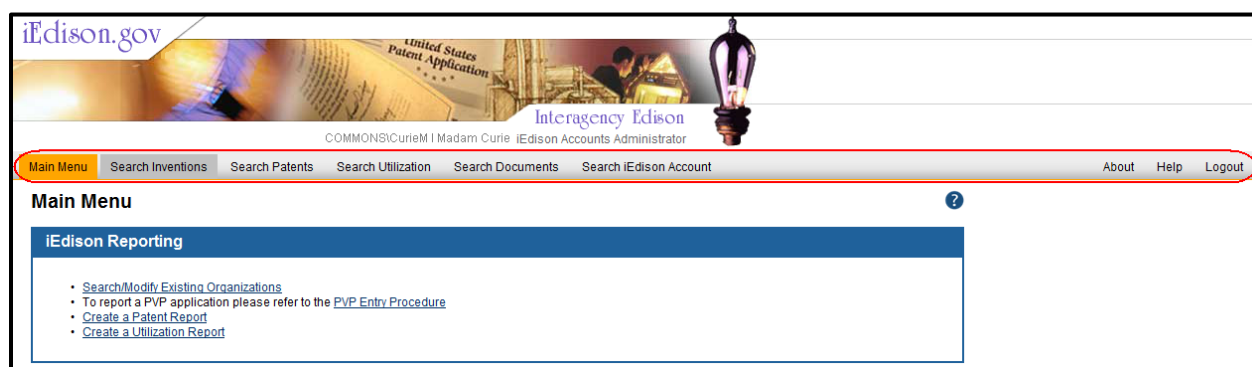


Figure 1: iEdison Main Menu Screen Displaying the New Look

Patent Search Screen

The following *Patent Search* screen changes are:

1. On the *Patent Search* screen the patent and invention search criteria can be expanded (default) or collapsed by clicking the + **View** or – **Close** buttons respectively on the right.
2. The **reset** hyperlink and the **Search** button appear on the right at the top and the bottom of the screen.

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Main Menu Search Inventions **Search Patents** Search Utilization Search Documents Search iEdison Account About Help Logout

Patent Search - Search for Patent Reports

Fill in any or all of these fields. Your search will encompass all the Patent Reports from your institution and from institutions that have given your institution permission to view their data.

Patent-Specific Search Criteria

Patent Docket Number

Provisional Patent Application Number (60 or 61 or 62/###,###)

Non-Provisional Patent Application Number (06 or 07 or 08 or 09 or 10 or 11 or 12 or 13 or 14 or 90/###,###)

PCT Patent Application Number (PCT/AA/YY/#####)

Patent Number (##### or RE##### or PLT#####)

U.S. Patent Title

Inventor Name (First)

Inventor Name (Last)

Filing Date of the Provisional Patent Application (mm/dd/yyyy)

Filing Date of the Non-Provisional Patent Application (mm/dd/yyyy)

Filing Date of the PCT Patent Application (mm/dd/yyyy)

Patent Issue Date (mm/dd/yyyy)

Invention-Specific Search Criteria

Invention Report Number 0513614-14-0002 (9999999999-99-9999)

Invention Docket Number

Invention Title

Invention Keyword

Invention Report Date (mm/dd/yyyy)

Inventor Name (First)

Inventor Name (Last)

Grant/Contract Number

Agency Designation All Agencies

Invention Status All Invention Statuses

DOE "S" Number

Search Buttons: Reset, Search, CLOSE (multiple instances)

Figure 2: Patent Search Screen Displaying New Look

When the **Search** button is clicked, the system performs the search and displays the appropriate search results. 10 patent records are displayed per page. The search results can be navigated by clicking the appropriate **Page Number**, **First**, **Next**, **First**, or **Last** hyperlinks.

The screenshot shows the iEdison.gov Patent Search interface. At the top, there's a header with the iEdison.gov logo and navigation links. Below that, a search bar is visible. The main content area displays search results for 'Caffeinated Office Supplies'. The results are organized into a table with columns: Primary Agency, Grantee Organization, Patent Docket Number, Patent Title, Invention Report Number, Invention Report Date, Invention Title, and Actions. The 'Actions' column contains links for 'Modify' and 'Transfer' for each entry. The table shows 10 entries, all from NIH, with various 'Caffeinated' items like Notebooks, Pens, Laptop, Staplers, Paper, Office Supplies, Mug, Router, Printer, and PROV PC. The 'Modify' link is highlighted in red in the original image.

Primary Agency	Grantee Organization	Patent Docket Number	Patent Title	Invention Report Number	Invention Report Date	Invention Title	Actions
NIH	SAN DIEGO STATE UNIVERSITY	123456-00	Caffeinated Notebooks	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify Transfer
NIH	SAN DIEGO STATE UNIVERSITY	123456-01	Caffeinated Pens	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify
NIH	SAN DIEGO STATE UNIVERSITY	123456-02	Caffeinated Laptop	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify
NIH	SAN DIEGO STATE UNIVERSITY	123456-03	Caffeinated Staplers	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify Transfer
NIH	SAN DIEGO STATE UNIVERSITY	123456-07	Caffeinated Paper	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify
NIH	SAN DIEGO STATE UNIVERSITY	123456-08	Caffeinated Office Supplies	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify
NIH	SAN DIEGO STATE UNIVERSITY	123456-10	Caffeinated Mug	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify Transfer
NIH	SAN DIEGO STATE UNIVERSITY	123456-11	Caffeinated Router	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify
NIH	SAN DIEGO STATE UNIVERSITY	123456-12	Caffeinated Printer	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify Transfer
NIH	SAN DIEGO STATE UNIVERSITY	123456-20	Caffeinated PROV PC	9999999-99-9999	10/31/2014	Caffeinated Office Supplies	Modify Transfer

Figure 3: Patent Search Screen Displaying Search Results

The **Modify** hyperlink option is in the **Actions** column.

Modify Patent Record Screen

By clicking the **Modify** hyperlink, the system displays *Modify Patent Record* screen.

Keywords and/or inventors can be added by typing the information in the appropriate field text box and clicking the **Add** button next to the field. Keywords and/or inventors can be deleted or modified by clicking the appropriate hyperlink.

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View Invention|Patent Tree: Vertical

Cancel Submit

Invention Report Number

9999999-99-9999

DOE "S" Number

Grantee/Contractor Organization

SAN DIEGO STATE UNIVERSITY (999999)

Patent Docket Number

123456-00

Type of Patent Application

CIP

U.S. Patent Title

Caffeinated Notebooks

Keyword(s)

Add

Keyword	Action
JOE COFFEE	Delete Modify
JOE	Delete Modify
joe	Delete Modify
coffee	Delete Modify

Inventor(s)

Add

First Name	Middle Name	Last Name	Action
Joe		Java	Delete Modify

Provisional Patent Application Number

(60 or 61 or 62/###,###)

Filing Date of Provisional Patent Application

required if Provisional Application number supplied

11/19/2014

(mm/dd/yyyy - cannot be before June 8, 1995)

Non-Provisional Patent Application Number

(06 or 07 or 08 or 09 or 10 or 11 or 12 or 13 or 14 or 90/###,###)

Filing Date of Non-Provisional Patent Application

required if Non-Provisional Application number supplied

11/19/2014

(mm/dd/yyyy)

PCT Patent Application Number

(PCT(AA/YYYY)#####)

Filing Date of PCT Patent Application

required if PCT number supplied

11/03/2009

(mm/dd/yyyy)

Patent Number

Help with Formats

Patent Issue Date

required if Patent number supplied

(mm/dd/yyyy)

Patent Expiration Date

(mm/dd/yyyy)

Figure 4: Modify Patent Record Screen - Top Half

Explanatory Notes

Government Notes
By: NIH_HARDISONA
On: 11/26/2014
test

Foreign Filings
Select Country active Add

* Patent Status INSTITUTION RETAINS RIGHTS

Parent Patent Docket Number

Parent Patent Organization Code 0999999

Other Related Inventions Add Add

Organization Code for Other Organizations to View This Patent

Current Government Support Clause [View Current Document](#)

Government Support Clause File Select One Browse... Uploading a revised document will replace the current document.

Government Support Clause Receipt Date (mm/dd/yyyy)

Government Support Clause Reject Date (mm/dd/yyyy)

Government Support Clause Reject Comment

Click on Predefined reject reason list to add to reject comments for Government Support Clause Above

4. Government Agency listed does not match.
5. Government Agency that awarded grant is missing.
6. Patent Number does not match.
7. Document submitted does not contain sufficient patent identifiers to verify that the document containing the Government Support Clause is fo

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Confirmatory License Receipt Date (mm/dd/yyyy)

Confirmatory License Reject Date (mm/dd/yyyy)

Confirmatory License Reject Comment

Click on Predefined reject reason list to add to reject comments for Confirmatory License above.

1. Patent Number does not match.
2. Patent Number is missing.
3. To ensure proper Recordation with the USPTO, please re-submit a signed Confirmatory License that lists only one patent or one patent appl
4. Grant Number does not match.

Final Patent Rights Determination

Final Patent Rights Determination Date (mm/dd/yyyy)

Domestic Waiver Decision Yes / No

Domestic Waiver Decision Date (mm/dd/yyyy)

Other Document(s)

Browse...

Cancel Submit

Figure 5: Modify Patent Screen - Bottom Half

By clicking the **Vertical** hyperlink at the top of the *Modify Patent Record* screen, the system displays hierarchical structure of the linked patents relating to the invention. Clicking the **Vertical** hyperlink again, the system closes the patent link structure.

For more information on linking multiple parent and child patents, please refer to the *Ability to Create Hierarchal Parent/Child Patent Structure for the Same Invention* topic below.

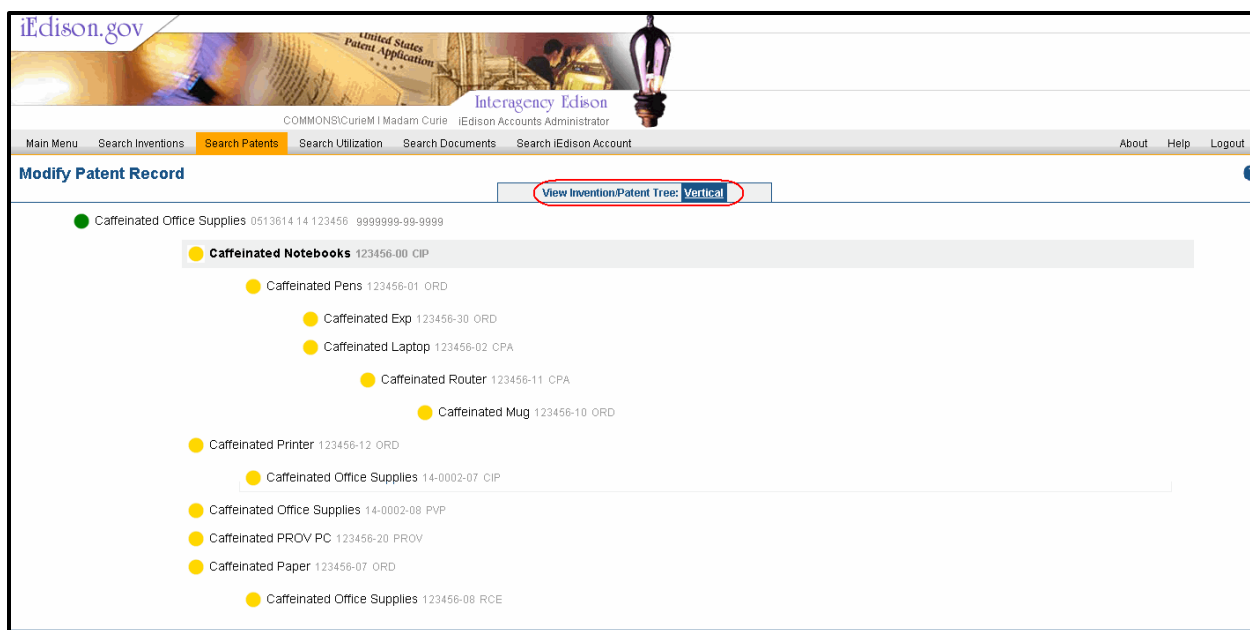


Figure 6: Modify Patent Record Screen Displaying a Patent Link Structure

If the **Cancel** button is clicked *Modify Patent Record* screen, the system displays a pop-up screen with the following message: *Are you sure you want to cancel and go back to the search results?*

If the **No** button is clicked, the system returns to the *Modify Patent Record* screen. If the **Yes** button is clicked, the system returns to the *Patent Search* screen displaying the search results.

After the appropriate edits have been made and the **Save** button is clicked on *Modify Patent Record* screen, the system performs validations.

If there are no errors, the system displays a pop-up screen with the following message: *Are you sure you want to Save your changes?* If the **No** button is clicked, the system returns to the *Modify Patent* screen. If the **Yes** button is clicked, the system saves the changes and displays the *View Patent Record* screen with a successful save message.

The patent can be edited again by clicking the **Edit Patent** button on the right at the top or the bottom of the *View Patent Record* screen.

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View Patent Record

View Invention/Patent Tree: [Vertical](#)

✓ SUCCESS-The patent record was saved.

Edit Patent

Invention Report Number

9999999-99-9999

DOE "S" Number

Grantee/Contractor Organization

SAN DIEGO STATE UNIVERSITY (999999)

Patent Docket Number

123456-00

* Type of Patent Application

CIP

* U.S. Patent Title

Caffeinated Notebooks

Keyword(s)

JOE COFFEE JOE joe coffee

* Inventor(s)

Joe Java

Provisional Patent Application Number

Filing Date of Provisional Patent Application

required if Provisional Application number supplied

11/19/2014

Non-Provisional Patent Application Number

Filing Date of Non-Provisional Patent Application

required if Non-Provisional Application number supplied

11/19/2014

PCT Patent Application Number

Filing Date of PCT Patent Application

required if PCT number supplied

11/03/2009

Patent Number

Patent Issue Date

required if Patent number supplied

Patent Expiration Date

Explanatory Notes

Government Notes

By: NIH_HAR|ISONA

On: 11/26/2014

test

Figure 7: View Patent Record Screen - Top Half

Government Notes By: NIH_HARDISONA
On: 11/26/2014
test

By: NIH_HARDISONA
On: 12/02/2014
test2

Foreign Filings

* Patent Status INSTITUTION RETAINS RIGHTS

Parent Patent Docket Number

Parent Patent Organization Code 0999999

Other Related Inventions

Organization Code
for Other Organizations to View This Patent

Current Government Support Clause [View Current Document](#)

Government Support Clause Receipt Date

Government Support Clause Reject Date

Government Support Clause Reject Comment

Current Confirmatory License [View Current Document](#)

Confirmatory License Receipt Date

Confirmatory License Reject Date

Confirmatory License Reject Comment

Final Patent Rights Determination

Final Patent Rights Determination Date

Domestic Waiver Decision No

Domestic Waiver Decision Date

Other Document(s)

Document Name	File	File Type	Document Category	Created By	Last Updated By	Visible
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[Edit Patent](#)

Figure 8: View Patent Record Screen - Bottom Half

Patent Transfer Screen

By clicking the **Transfer** hyperlink on the *Patent Search* screen, the system displays the *Patent Transfer* screen. The **Transfer to Invention Number** value is entered.

NOTE: Only IDO Admin and IDO User can transfer a patent to another invention.

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United States Patent Application

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Patent Transfer - Transfer from Current Invention to Another Invention

You have requested that the patent with docket number, **123456-00** be transferred to another invention.
NOTE: Once transferred, the patent information will be accessible only under the invention that it has been transferred to.

Please specify the invention it needs to be transferred to below:

Transfer from Invention Number 9999999-99-9999

Transfer to Invention Number

[Submit](#) [Cancel](#)

Figure 9: Patent Transfer Screen Displaying Transferring a Patent

If the **Cancel** button is clicked, the system displays a pop-up screen with the following message: *Are you sure you want to cancel and go back to the search results?* If the **No** button is clicked, the system returns to the *Patent Transfer* screen. If the **Yes** button is clicked, the system returns to the *Patent Search* screen displaying the search results.

If the **Submit** button is clicked, the system displays a pop-up screen with the following message: *Are you sure you want to submit the Transfer request?* If the **No** button is clicked, the system returns to the *Patent Transfer* screen. If the **Yes** button is clicked, the system displays the *Patent Search* screen with a confirmation message that the patent transfer was successful.

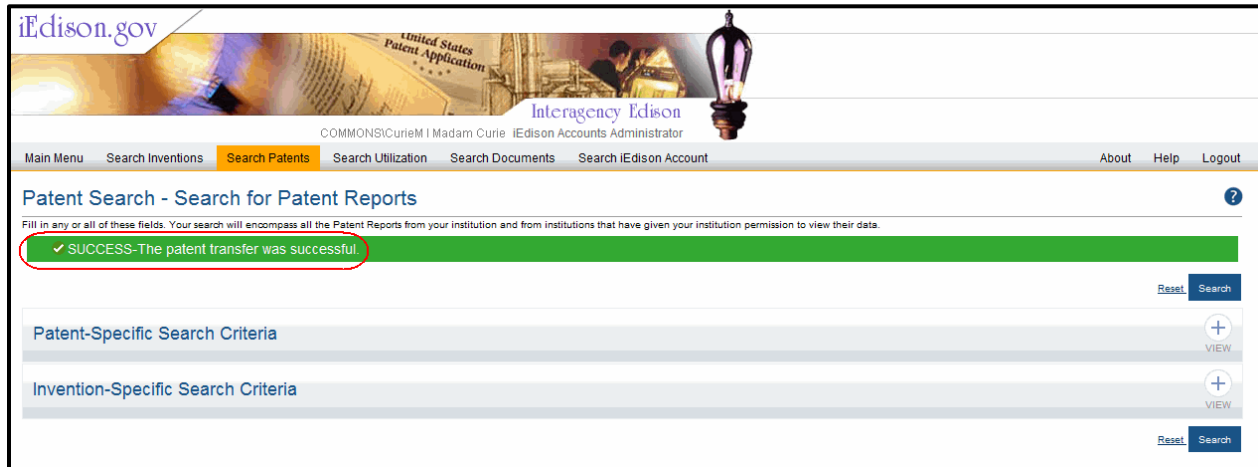


Figure 10: Patent Search Screen Displaying Transfer Patent Successful Message

Create Patent Record Screen

The *Create Patent Record* screen has similar features to the *Modify Patent Record* screen.

Keywords and/or inventors can be added by typing the information in the appropriate field text box and clicking the **Add** button next to the field. Keywords and/or inventors can be deleted or modified by clicking the appropriate hyperlink.

By clicking the **Vertical** hyperlink at the top of the *Create Patent Record* screen, the system displays hierarchical structure of the linked patents relating to the invention. Clicking the **Vertical** hyperlink again, the system closes the patent link structure.

Patent Number [Help with Formats](#)

Patent Issue Date (mm/dd/yyyy)

Patent Expiration Date (mm/dd/yyyy)

Explanatory Notes
By: curiem
On: 2009-04-28
Four provisionals combined to file formal patent application NU99999/NU99999

Foreign Filings Select Country active

* Patent Status INSTITUTION RETAINS RIGHTS

Parent Patent Docket Number

Parent Patent Organization Code 9999999

Other Related Inventions

Organization Code

Government Support Clause File Select One Browse... Uploading a revised document will replace the current document.

Government Support Clause Receipt Date

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Government Support Clause Reject Comment

New Confirmatory License File Select One Browse... Uploading a revised document will replace the current document.

Confirmatory License Receipt Date

Confirmatory License Reject Date

Confirmatory License Reject Comment

Final Patent Rights Determination

Other Document(s) Browse...

Figure 12: Create Patent Record Screen - Bottom Half

If the **Cancel** button is clicked, the system returns to the *Invention Report Search* screen.

If the **Submit** button is clicked, the system performs validations. If there are no errors, the system creates the new patent report and displays the *View Patent Record* screen with a successful create patent message. The patent can be edited by clicking the **Edit Patent** button on the right at the top or the bottom of the *View Patent Record* screen.

Ability to Create Hierarchal Parent/Child Patent Structure for the Same Invention

There is the ability to link multiple patents to the same invention. Within those multiple parent patents child patents can be created and child patents can be created under those child patents. Thus a parent /child hierarchal structure can be created. Please refer to Figure 6 for an example of a parent /child hierarchal structure.

To link a *Patent Report* to an invention, please follow the procedures outlined in the iEdison online help [Link a Patent Report](#) topic.

NOTE: Only Agency users can create patent links for patents under different inventions.

General Patent Linking Business Rules

1. Any patent can be linked as a child to another patent derived from the same invention.

2. If the parent patent is derived from a different invention at the **same** institution, the child patent must be of type CIP.
 - a. Only an IDO/ Super Admin user may create the link. (i.e. Only patents of type CIP can have an explicit link to a parent patent derived from a different invention).
3. If the parent patent is derived from an invention at a **different** institution, then only an IDO/Super Admin user can create the link.
 - a. The child patent must be of type CIP.
 - b. The parent patent must have been made visible to the extramural Institution of the user.
4. The system shall not allow establishment of a parent relationship from one patent to another that would include a circular reference within the full set of relationships.
5. The Confirmatory License of a parent patent shall propagate to the child patent(s) for validations and notification.
6. If a user modifies an invention or parent such that an explicit parent/child relation would be broken, the system shall provide an appropriate warning message.
7. If a user modifies an invention or patent such that an explicit parent/child relation is broken, an email is sent and the occurrence is audited.

Implicit Patent Linking Business Rules

NOTE: Implicit patent linking involves a non-provisional patent application.

1. The first patent in an implicit patent link chain may not be CPA/RCE or CON type.
2. All but the first patent in an implicit patent link chain must be CPA or RCE type.
3. Only the last patent in an implicitly linked patent chain may be modified in a fashion that would break the parent/child relationship.
4. All patents in an implicitly linked (CPA/RCE) chain must be associated with a single invention.
5. Only NIH iEdison Accounts Administrators and IDO iEdison users can update a U.S. Patent Title in a patent that is parent in a continuation patent (CPA/RCE) chain. Only the last patent in the chain's title can be modified by TTO user.

Ability to Provide a Date Range when Generating iEdison Invention Report

There is the ability to provide a date range when generating iEdison *Invention Reports*. On the *Generate Invention Report* screen, the **Invention Report Date** field has a **Start** and **End** date fields with a format of *mm/dd/yyyy*. The *Invention Report* itself looks the same. The *Invention Report* excludes transferred and voided inventions.

Generate Invention Report

Enter the report criteria for the report you want to generate and then choose "Submit" to generate the report.

You have the option of viewing the report on your monitor, or downloading (i.e. saving) the report file on your hard drive.

If you choose to view it on the screen, you can select the non-delimited format so that you can easily read it.

To import the file into another application, download the file and save it as either a comma-delimited or tab-delimited file, as required by your application.

Criteria for searching for iEdison Invention Reports
(to have all inventions listed, leave all search criteria fields blank)

Invention Report Number (report is limited to inventions within your Institution)	<input type="text"/>	((999)9999999-99-9999)
Invention Docket Number	<input type="text"/>	
Invention Title	<input type="text"/>	
Invention Keyword	<input type="text"/>	
Invention Report Date	Start <input type="text"/> (mm/dd/yyyy)	End <input type="text"/> (mm/dd/yyyy)
Inventor Name (First)	<input type="text"/>	
Inventor Name (Last)	<input type="text"/>	
Grant/Contract Number	<input type="text"/>	
Agency Designation	All Agencies <input type="button" value="v"/>	
Invention Status	Select One <input type="button" value="v"/>	

Figure 13: Generate Invention Report Screen

Fixes

Confirmatory License now Propagating to the Child Patent Report when Linking Patents

Previously when a child Patent Report was linked to a parent Patent Report messages were produced that stated to upload a Confirmatory License. The message should not have been produced because the Confirmatory License should have been propagated to the child Patent Report.

Resolution

The Confirmatory License is now being propagated to the child Patent Report when it is linked to a parent Patent Report.